

Procedure Title	Performance Appraisal: Custodial and Maintenance Employees		
Date of Issue	May 25, 2016	Related Policy	BP 7150-D
Revision Dates		Related Forms	AF 7132, AF 7133
Review Date		Originator	Administrative Council
References			

1.0 RATIONALE

- 1.1 Bluewater District School Board is committed to providing fair, effective, consistent and comprehensive feedback on the employee's work performance.
- 1.2 Through dialogue with their supervisor, employees will be provided with:
 - a) an opportunity to reflect on their accomplishments;
 - b) a comprehensive evaluation of their work performance; and
 - c) a forum for reviewing objectives, identifying job expectations and establishing goals and recommendations for growth for the following years.
- 1.3 Performance appraisals provide an opportunity for identifying and discussion areas for improved performance and any support that an employee may require, as well as training and development needs.

2.0 GENERAL

- 2.1 Performance appraisals for custodial and maintenance employees will be conducted on a five-year evaluation cycle.
- 2.2 An interim review may be conducted at any time during the five-year evaluation cycle, as determined by the supervisor.
- 2.3 If concerns arise, they should be addressed immediately, as opposed to waiting until the performance appraisal meeting.
- 2.4 Custodial and maintenance employees who are new to the board will receive a performance appraisal once during the six-month probation period.
- 2.5 If a custodial or maintenance employee is on an extended leave during all or part of a year that is scheduled as an evaluation year, any performance appraisal that would otherwise be carried out during that period will be initiated, commencing with the pre-appraisal meeting, within sixty business days following return from leave.

3.0 PERFORMANCE APPRAISAL PROCEDURE

- 3.1 The custodial supervisor, or designate, will notify the custodial and maintenance employee who is in their evaluation year.

3.2 PRE - APPRAISAL MEETING

- i) The custodial supervisor, or designate, should set-up a pre-appraisal meeting for custodial and maintenance employees, in their evaluation year, to review and familiarize them with the performance appraisal process, ensure the expectations of the performance appraisal are clearly understood and to discuss any procedural issues and aspects of professionalism.
- ii) This meeting will initiate the performance appraisal evaluation period. The performance appraisal evaluation period will be from September through August. The performance appraisal will be completed by August 31 of the appraisal year.

3.3 DATA COLLECTION

- i) The custodial supervisor, or designate, shall review any evidence that they have collected during the performance appraisal evaluation period which demonstrates the employee's work performance. Evidence for each performance appraisal may include, but is not limited to, information obtained from: reviewing information concerning job requirements; reviewing the job description and the core competencies for the employee's position; viewing and scripting of performance; reviewing materials such as records, plans, resources; discussion of performance as it relates to Plant Services procedures.

3.4 PERFORMANCE APPRAISAL MEETING

- i) At the conclusion of the performance appraisal evaluation period, the custodial supervisor, or designate, will review the data collected and arrange the performance appraisal meeting.
- ii) The purpose of the performance appraisal meeting is to:
 - a. Discuss the employee's general work performance over the past year, as well as any specific areas that require improvement;
 - b. Discuss implications of the supervisor's review, including performance rating;
 - c. Provide evidence that documents the evaluation of each core competency;

3.5 PERFORMANCE APPRAISAL FINAL REPORT AND RATING

- i) The custodial and maintenance employee's final performance appraisal report will be documented using AF 7133 "Custodial and Maintenance - Performance Appraisal Final Report", which will contain the following:
 - a. An evaluation of the employee (accompanied by explanation(s) for each core competency, as well as an overall rating, according to the following rating scale:

M	Meets Expectations (employee completes job assignments as expected)
DNM	Does Not Meet Expectations (Employee is not meeting expected performance standards and needs to make significant improvement in job performance)
DN	Development Needed (Employee needs to make some specific improvements in job performance)
N/A	Not Applicable (If a particular factor is not applicable to the employee being evaluated, a notation of N/A may be inserted)
- ii) AF 7133 "Custodial and Maintenance - Performance Appraisal Final Report" will be signed and dated by the custodial supervisor, or designate, who conducted the performance appraisal meeting, and a copy will be provided to the custodial and maintenance employee at the conclusion of the performance appraisal meeting.
- iii) The custodial and maintenance employee will be given an opportunity to review the evaluation and provide written comments within five (5) working days after the completed AF 7133 "Custodial and

Maintenance - Performance Appraisal Final Report is presented to them. The custodial and maintenance employee will sign and date the form indicating that they have received a copy of it.

- iv) A copy of the final AF 7133 "Custodial and Maintenance - Performance Appraisal Final Report will be distributed to the employee and the Executive Officer of Human Resources Services (for placement in the personnel file).

4.0 DOES NOT MEET EXPECTATIONS RATING

- 4.1 In instances where a custodial and maintenance employee performance appraisal results in a Does Not Meet Expectations rating on AF 7133 "Custodial Maintenance - Performance Appraisal Final Report, the following additional procedures will be adhered to:
 - i) If the employee receives any "Does Not Meet Expectations" rating(s), the custodial supervisor, or designate, seeking input from the employee, will complete AF 7132 "Performance Appraisal Improvement Plan" outlining how the employee will improve performance, including specific goals, any required training and development, and time frames for completion.
 - ii) If the custodial supervisor, or designate, is recommending an overall rating of Does Not Meet Expectations, the supervisor will complete AF 7132 "Performance Appraisal Improvement Plan" and designate an appropriate time frame for re-evaluation. In this situation, the performance appraisal must be discussed with the appropriate Superintendent and must be sent to Executive Officer of Human Resources Services for review prior to being presented to the employee.